

Oracle Hyperion Planning 11.1.1: Create & Manage Applications

Durée: 5 Jours

Description

This course is designed to teach you how to create and administer applications using the Planning software. You learn how to create applications, add dimensions and members, import members, load data, set up security, create data forms, set up task lists, set up calculations, and move a plan through the planning cycle. Exercises and a case study provide hands-on practice.

Learn To:

- Create Planning applications
- Set up security for users, groups, and members
- Create data forms and enter data
- Set up business rules
- Manage the planning process
- Import data and metadata

Audience

- Administrator
- Développeurs Forms
- Forms Developer
- Functional Implementer

Cours pré-requis

Cours pré-requis obligatoire(s)

Basic knowledge of planning and budgeting

Working knowledge of Essbase recommended

Basic Microsoft Windows skills

Basic Microsoft Excel or Lotus 1-2-3 skills

Objectifs

- Load data into Planning applications
- Set up security for users, groups, and members
- Create data forms and enter data
- Set up and test business rules
- Review budget data by using process management
- Migrate application artifacts

Thèmes abordés

Planning Overview and Navigating Workspace

Oracle's Enterprise Performance Management System

Planning Architecture

Planning and Essbase

Launching Workspace

Workspace User Interface

Workspace Navigate Menu

Opening Applications

Navigating in Planning

Creating Dimensions Overview

Planning Dimensions

Required and User-Defined Dimensions

Dense and Sparse Dimensions

Creating Data Blocks

Selecting Aggregation, Data Storage and Calculation Options

Managing Dimensions with Performance Management Architect

Creating Applications Using Performance Management Architect

Adding Dimensions to Shared Library

Working with Shared and Local Dimensions

Creating and Managing Members

Creating Associations Between Dimensions

Working with Grid Editor

Adding Currencies and Aliases

Automating Performance Management Architect Tasks

Setting Up the Period, Scenario, and Version Dimension

Creating Time Periods

Period and Year Dimensions

Dynamic Time Series Members

Creating Scenarios

Creating Versions

Setting Up the Entity Dimension

Entity Members and Plan Types

Currency Value for Entities

Adding and Modifying Entities

Saving Dimensions

Deleting Entities

Setting up the Account Dimension

Account Types

Creating Account Hierarchies

Creating User-Defined Elements

User-Defined Dimensions

- Creating Attributes
- Assigning Attribute Values
- Member Formula Overview
- Creating Smart Lists

Loading Metadata from a File

- Metadata Load Files Overview
- Formatting Load Files
- Loading Metadata Process
- Best Practices
- Loading Metadata from Interface Tables

Creating Applications

- Application Creation Process
- Plan for Application Setup
- Setting Up Application Components
- Selecting Dimensions
- Configuring Application Settings
- Adding Dimensions from Shared Library
- Activating Dimension Associations
- Adjusting Performance Settings

Deploying Applications

- Deployment Process
- Validating Applications
- Comparing Applications
- Deploying Applications
- Redeploying Applications

Setting Up Exchange Rates

- Currencies and Exchange Rates
- Exchange Rates Tables Overview
- Creating Exchange Rate Tables
- Exchange Rates and the HSP_Rates Dimension
- Generating Currency Conversion Calculation Scripts

Loading Data and Calculating Data

- Data Loads
- Data Calculations
- Loading Data Using Administration Services
- Creating Data Load Rules
- Staging Data with Interface Tables
- Loading Data Using ETL Tools

Provisioning Users and Groups and Setting up Access Rights

- Planning Security Overview
- User and Group Provisioning Overview
- Provisioning Users and Groups
- User Roles
- Generating Provisioning Reports
- Assigning Access Rights
- Importing Access Rights

Creating Security Filters

Creating Data Forms and Folders

Data Forms and Folders Overview

Data Forms and Folders Overview

Setting Up Data Forms

Creating Composite Data Forms

Printing Data Form Definition Reports

Assigning Access Rights to Data Forms

Assigning Data Form Folder Security

Customizing Data Forms

Exporting and Importing Data Forms

Menus

Setting up Custom Messaging

Specifying Advanced Settings

Managing User Variables

Setting Up User Preferences

Entering Data

Submitting Data in Data Forms

Launching Dimension Editor from Data Forms

Spreading Data

Adjusting and Annotating Data

Calculating Data in Data Forms

Entering Data with Smart Lists

Navigating Data Forms with Menus

Entering Data Using Smart View

Smart View Overview

Working with Smart View

Working with Ad Hoc Analysis

Working Offline

Creating Business Rules

Business Rules and Calculation Manager Overview

Business Rules Creation Process

Assigning Calculation Manager Security

Determining Calculation Requirements

Launching Calculation Manager

Setting Up Business Rules

Validating and Deploying Rules

Assigning Launch Access and Launching Business Rules

Managing Business Rules and Adding Variables and Formulas

Templates Overview

Creating Custom-Defined Templates

Creating Business Rules with Templates

Creating Rulesets

Validating and Deploying Business Rulesets

Creating Variables

Setting Up Runtime Prompt Variables

Managing the Approval Process and Creating Task Lists

Managing the Review Cycle for Planning Units

Copying Data Between Versions

Clearing Cell Details

Copying Data

Navigating Task Lists

Building Task Lists

Assigning Access to Task Lists

Validating Task Lists and Reporting on Task Lists

Managing Application Lifecycles

Lifecycle Management Overview

Artifacts

Viewing and Searching for Artifacts

Viewing LCM Reports

Building and Setting Up Classic Applications

Classic Application Creation Process

Configuring Data Sources in Classic Application Wizard

Working with Classic Application Wizard

Building Member Hierarchies

Modifying Member Properties

Creating Alias Tables and Smart Lists, and Setting Up Member Formulas and UDAs

Loading Metadata, and Data into Classic Applications and Importing Data Forms

Creating Business Rules for Classic Applications